

# The ROI Methodology™ Fact Sheet

Experience  
Experience

## Origin and Development

The ROI Methodology was developed by Dr. Jack J. Phillips in the 1970s, refined through application and use in the 1980s, and implemented globally during the 1990s.

- ✓ First impact study-1973, Measuring ROI in Corporate Education Program, for Lockheed-Martin
- ✓ First public presentation on the methodology – 1978, ASTD Annual Conference
- ✓ First book on methodology published – 1983, *Handbook of Training Evaluation and Measurement Methods*, the first USA book on training evaluation
- ✓ First one-day public workshop – 1991, Birmingham, Alabama
- ✓ First two-day public workshop – 1992, Johannesburg, South Africa
- ✓ First case study book published – 1994, *Measuring Return on Investment*, ASTD
- ✓ First international associate established – 1994, Indonesia
- ✓ First public certification workshop – 1995, Nashville, Tennessee
- ✓ ROI Network organized – 1996
- ✓ First ROI Network Conference – 1997, New Orleans, Louisiana
- ✓ First International ROI Network Conference – 2002, Toronto, Canada
- ✓ First ROI in Government Conference – 2003, Gulfport, Mississippi
- ✓ First ROI software release – 2003, Knowledge Advisors
- ✓ Online ROI Certification launched – 2006, University Alliance
- ✓ ROI Certification offered as part of master's and Ph.D. program – Capella University, 2006
- ✓ **ROI of Engagement initiative created** – 2009
- ✓ **First ROI of Engagement workshop** – 2009

## Use

More than 4,000 organizations use the ROI Methodology  
3,000 organizations formally implement the methodology through ROI Certification in more than 50 countries  
Approximately 5,000 impact studies are conducted annually  
At least 300 public sector governmental units are using the methodology  
ROI implementation was first pursued in manufacturing, then moved to service, healthcare, nonprofits, governments, education systems and is now in engagement

## Typical Applications

Leadership Development/Career Management/Competency Systems/Diversity/E-Learning/Coaching/Consulting /Ethics/Compliance/Meetings and Events/Management Development/Marketing/Organization Development/Orientation/Recruiting/Selection/Knowledge Management/Safety & Health Programs/Skill-Based/Compensation/Technology Implementation/Quality/Six Sigma/Wellness/Fitness Initiatives/Engagement

## Education

Approximately 200 one-day workshops conducted with more than 8,000 participants  
Approximately 500 two-day workshops conducted with more than 15,000 specialists and managers  
Routine schedules of one-day, two-day, and three-day workshops offered in the USA  
More than 4,000 professionals attended certification, more than 3,000 organizations in over 50 countries  
More than 30 books published in more than 20 countries

## Global Implementation

First implementation of the ROI Methodology outside the USA – 1992, South Africa  
First certification in non-English language – 1995, Italy  
Implementation in 51 countries, with additional implementations planned in other countries  
Books published in 33 languages  
Twelve international case study books in development or in the planning states